

Session 5: Module 8 - Referrals	
SCRIPT	
Description	Text
1. Introduction	Welcome to Session 5 Module 8
2. Start	<no script>
3. <ref>	So far, we've completed our review of the assessment sections of the CGS, which are on the left side of the CGS screen.
	We are going to continue Session 5 by reviewing some of the non-assessment sections of the CGS, which are on the right side of CGS screen...
	...beginning with Referrals/Other Programs. Click on the link
	Go ahead and open the Referrals section.
4. <ref1>	This screen is exactly the same in both the CGS and the Participant Folder.
	The screen has two functions: to document referrals made by WIC staff...
	...and to document other programs the participant is currently participating in.
	Referral documentation, or the left side of the screen, is required by the system to complete the CGS...
	...while Other Program Enrollment, on the right side of the screen, is NOT.
5. <ref2>	Let's start by reviewing the Referrals side of the screen.
	Like most contact records in M-SPIRIT, you can only add one referral contact per date.
	Let's add a referral contact for Hyacinth. Click the Add button.
6. <ref3>	As usual, the Date of Referral(s) defaults to the current date.
	You can enter a past date but once the record has been created for a past date it cannot be edited or deleted.
	The Programs listed on the left side of the screen are referral topic headers; there are different topics available to each agency based on their referral agencies.
	The number of topics listed is determined by your agency...
	...and only topics with referrals assigned to them display.
	Let's see what that means. Click the + next to Yellowstone County WIC...
7. <ref4>	All of the topics displayed have an "Organization", or referral agency, assigned to them.

Session 5: Module 8 - Referrals	
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	Only the referral agency can be selected, you cannot select the topic headers.
	We are going to select Head Start. Click on the referral organization.
8. <ref5>	Once the referral is highlighted, you can select it by clicking the >> (select) button. Go ahead and click it.
9. <ref6>	Note that you cannot double-click to select. You always have to use the >> (select) button.
	Notice also that the selected referral displays both the topic header and the referral itself.
	You can add as many referrals for this contact date as you provide to the participant.
	Go ahead and select Office of Public Assistance.
10. <ref7>	The << (remove) button becomes enabled once you click a selected referral on the right side of the screen to highlight it.
11. <ref8>	Click the << (remove) button.
12. <ref9>	Click OK to save the referral.
13. <ref10>	The date of each referral contact and the referrals provided display on the left side of this screen.
	You can edit a referral only on the date the contact record is created.
	The referral can only be edited in the CGS when created in the CGS...
	...and, conversely, only edited in the Participant Folder when created in the Participant Folder.
	The Edit button becomes enabled when you click on either the contact date or the referral.
	Go ahead and click on the contact date...
14. <ref11>	...and notice that the Edit button is now enabled.
	Let's add another referral for Hyacinth.
	Remember we can't add another referral contact record on the same date, but we can edit our current contact record and add another referral, so click the Edit button.
15. <ref12>	As with any time you edit a contact record in M-SPIRIT, the Date is disabled.

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	The previously selected referrals automatically populate and can be removed.
	We are going to add an Office of Public Assistance referral. Go ahead and do that.
16. <ref13>	<no script>
17. <ref14>	<no script>
18. <ref15>	Well done!
	Click OK.
19. <ref16>	We can also print a list of the referrals we've provided to Hyacinth.
	Again, click the contact record date to enable the button.
20. <ref17>	You can print the list of referrals provided on a specific date at any time.
	Clicking the Print button will send the document to the printer designated for reports.
21. <ref18>	You can also delete a referral completely on the same date it is saved.
	Click the referral contact record date one more time...
22. <ref19>	...and now that the Delete button is enabled, click it.
23. <ref20>	Click Yes to complete the record deletion.
24. <ref21>	Since there is no longer a record, we can add another referral record, which we have to do since it is required to complete the CGS.
	Click the Add button.
25. <ref22>	We have one more thing we need to review in this screen.
	Sometimes, there isn't an appropriate referral to provide to a participant.
	Therefore, when necessary, you can select No Referral to complete the system's requirement for a referral without actually making one.
	Go ahead and select this referral option for Hyacinth and click OK
26. <ref23>	<no script>
27. <ref24>	<no script>
28. <ref25>	The right side of the screen allows you to maintain an on-going list of programs the participant is already enrolled in.

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	If enrollment is pertinent to WIC continuity of care, such as participant utilization of food shelf and breastfeeding resources, then it may be best practice to document it.
	That said, your local agency can choose whether or not it's going to document other program enrollment.
	The programs listed in the Available grid are the same topics (in a random sort order) for which your agency has referrals.
29. <ref26>	To document that Hyacinth is currently enrolled in a program we simply move the program from the Available grid to the Selected grid.
	Click on Yellowstone County WIC to highlight...
30. <ref27>	...which enables the Select button. Go ahead and click it.
31. <ref28>	Notice that there isn't a contact record date associated with the Other Program Enrollment selections.
	The Selected grid maintains a running list of programs.
	You can add and remove the programs at any time and the selected programs will remain until they are removed.
32. <ref29>	Click the OK button to save the changes to the Referral/Other Programs screen.
33. <ref30>	<no script>
34. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.